



### About Creating and Updating an Employee Profile

An employee profile must be entered in Cardinal before:

- An employee can be granted access to Cardinal
- An employee's travel or expense transactions can be entered or reimbursed

The employee profile contains the employee name, address, employee status, Agency Business Unit, department, supervisor, cash advance level, and payment information (such as EDI bank account information).

Employee Profiles can be added and updated by agency users with the Employee Profile Maintenance role. Profile maintenance includes changes of address, department, default distribution ChartFields, optional user defaults, supervisor changes, or Employee Status.

### Adding a Proxy

In order to have expense transactions entered, every employee must have at least one proxy (authorized user) set up. After creating the employee profile, be sure to add a proxy or proxies for every employee profile created. For more detailed information about how to authorize a proxy, see the job aid entitled **AP315 Authorizing a Proxy for an Employee** located on the Cardinal website in **Job Aids** under **Learning**.

The Cardinal Remittance Electronic Data Interchange (REDI) Authentication Interface process verifies all newly created employee accounts in the REDI Virginia system.

Banking information is interfaced daily from the Commonwealth Integrated Payroll/Personnel System (CIPPS). The DOA EDI Coordinators have access to enter this information when necessary (e.g., when CIPPS update has not yet been processed).

An Employee Profile can be created online or uploaded into Cardinal via an interface. All interfaced files are processed in the nightly batch.

This job aid provides details for creating and updating an employee profile online in Cardinal.

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## **Accounts Payable Job Aid**

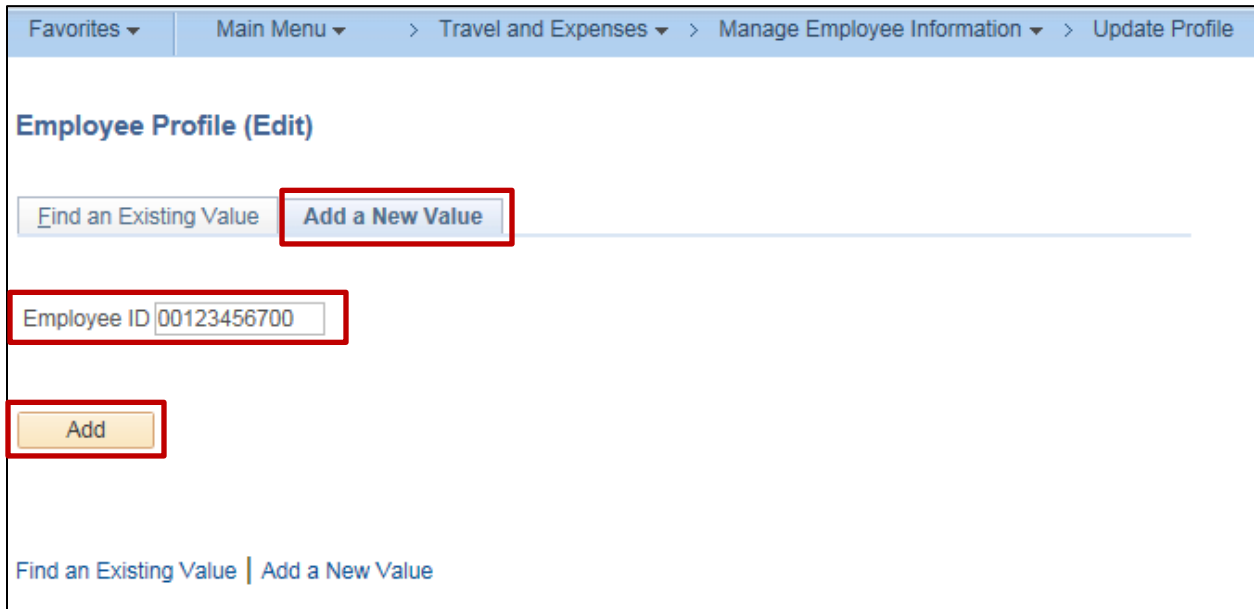
### **SW AP316 Creating and Updating an Employee Profile**

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### Creating a New Employee Profile

1. Navigate to the **Employee Profile (Edit)** page using the following path:

**Main Menu > Travel and Expenses > Manage Employee Information > Update Profile**




2. Click the **Add a New Value** tab.
3. Enter the **Employee ID** number. The **Employee ID** is the main data key in the employee profile. This number is derived from Cardinal Employee IDs based on PMIS IDs in the format of (00 + 7-digit PMIS ID + 00). Employee Profiles are established in FIN using the Cardinal Employee ID.  
**NOTE:** To add any new employee, use a suffix (i.e., last 2 digits of employee ID) of 60-69, with the first employee record (job) as 60 and any subsequent employee records (jobs) as 61 through 69 (e.g., 00123456760). This is required due to the implementation of the Human Capital Management (HCM) system.
4. Click the **Add** button.

An error message displays if an Invalid Employee ID Suffix is entered. If no message displays, proceed to step 7.



5. Click the **OK** button to close the message.
6. Enter an **Employee ID** with a suffix between 60-69.

The **Employee Profile Search** page returns with the Search Results displayed.



**Employee Profile (Edit)**

Find an Existing Value | Add a New Value

Employee ID:

Add

The value you tried to add already exists.  
Select it below if you'd like to update it, or  
specify a new value in the fields above.

**Search Results**

View All | First | 1 of 1 | Last

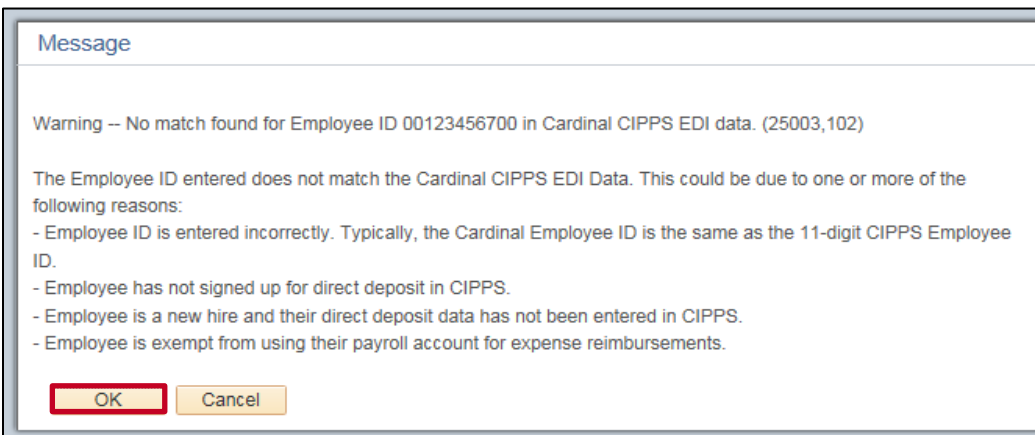
Employee ID	Name	Last Name
00123456760	Tom Jones	Jones

Find an Existing Value | Add a New Value

**Note:** If you enter the **Employee ID** and the employee already has a profile in Cardinal, the name information displays at the bottom of the page like the screenshot above.

7. Click the **Employee ID** to access their profile and go to the section entitled **Updating an Employee Profile** on page 11 of this job aid.

If the **Employee Profile** does not exist, a warning message displays



Employee banking information is interfaced daily from CIPPS. If the information does not match data in CIPPS, a **Warning** message like the one above displays.

The CIPPS interface is run in the nightly batch daily. The interfaced EDI Data is stored in the Cardinal archived CIPPS tables, so this is not an online direct feed from CIPPS when adding the employee.

Due to timing, the employee's banking information may not be added until the next run of the CIPPS interface. The employee will be reimbursed by check until this information is updated.

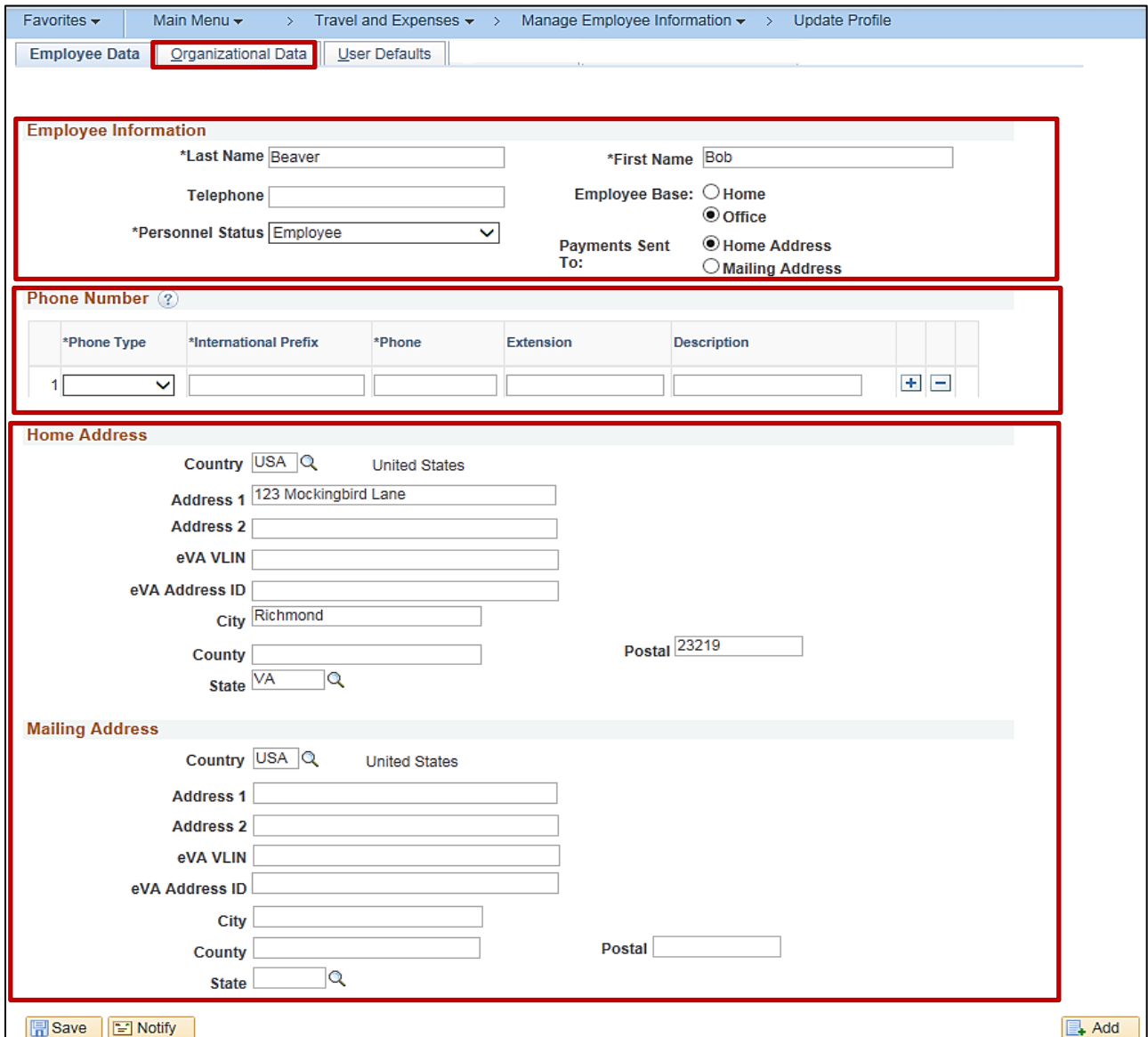
Any questions regarding the employee banking information should be addressed to the DOA EDI Coordinator. The Bank Account tab on the Employee Profile is only visible to the EDI Coordinator because it contains sensitive (i.e., personal banking) information. The EDI Coordinators will also have access to enter any banking information not interfaced from CIPPS.

8. Validate that the **Employee ID** is correct and should be added.

**Note:** If the **Employee ID** is incorrect and should not be entered at this time, click the **Cancel** button to exit the page.

9. Click the **OK** button to close the message and continue entering the employee profile.

The **Employee Data** page displays.



Favorites ▾ Main Menu ▾ > Travel and Expenses ▾ > Manage Employee Information ▾ > Update Profile

Employee Data **Organizational Data** User Defaults

---

**Employee Information**

\*Last Name  \*First Name   
 Telephone  Employee Base: ☐ Home ☒ Office  
 \*Personnel Status  Payments Sent To: ☒ Home Address ☐ Mailing Address

**Phone Number** ?

*Phone Type	*International Prefix	*Phone	Extension	Description		
1 ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

**Home Address**

Country   United States  
 Address 1   
 Address 2   
 eVA VLIN   
 eVA Address ID   
 City   
 County  Postal   
 State

**Mailing Address**

Country   United States  
 Address 1   
 Address 2   
 eVA VLIN   
 eVA Address ID   
 City   
 County  Postal   
 State

10. Complete the information under the **Employee Information** section of the page:
  - a. Enter the employee **Last Name, First Name**.
  - b. **Personnel Status** – select **Employee**.
  - c. The **Payments Sent To** defaults to the Home Address.
  - d. If the employee has a separate mailing address, click the **Mailing Address** checkbox.
11. The **Phone Number** section of the page is optional. If you select a **Phone Type** from the drop-down menu, the system requires you to enter a telephone number. For this scenario, no **Phone Type** is selected.



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### SW AP316 Creating and Updating an Employee Profile

12. In the **Home Address** section of the page, enter the appropriate information:
  - a. Enter the employee's **Address, City, Zip**, and **State**. The Zip code (Postal field) needs to include the hyphen if in the ZIP + 4 format (99999-9999).
13. If an employee's home address and mailing address differ, click the button in front of Mailing Address and complete the **Mailing Address** section:
  - a. Enter the **Address, City, Zip**, and **State**. The Zip code (Postal field) needs to include the hyphen if in the ZIP + 4 format (99999-9999).
14. Click the **Organizational Data** tab.

The **Organizational Data** page displays.

Expenses Processing Data

Valid for Expenses No

Reason for Status

HR Information

Employee Status Active

Hire Date 11/28/2016

\*GL Unit 15100 Department of Accounts

\*Department 92100 Admin Svcs & Public Records

Hours Per Period ☒ Use Business Unit Default

Supervisor Information

\*ID 00446170800

Name Doe, John

Default ChartField Values

*GL Unit	Fund	Program	Cost Center	Task	FIPS	Asset	Agency Use 1	Agency Use 2	Affiliate	Fund
15100	01000	799001								

Cash Advance Level

☒ Business Unit 5,000.00 USD

☐ Specific Amount

☐ None

Expense Role

"If desired, an expenses role can be associated with this employee. Please note that only one role can be assigned, per employee, no matter how many jobs they hold within the company."

Expense Processing Role

Save Notify Add

15. On the **Organizational Data** page under the **Expenses Processing Data** section:
  - a. **Default Profile** checkbox: this box should be **checked**. If not, check it.
  - b. **Per Diem Amount Type**: this field should have **Active Amounts** selected; if not, select it.

16. Complete the following in the **HR Information** section:
  - a. **Employee Status:** select **Active**.
  - b. **Hire Date:** Enter the employee's date of hire at your agency.
  - c. **GL Unit:** Enter the Business Unit for the employee being entered.
  - d. **Department:** Enter or select the appropriate Department code for the employee.
  - e. The **Use Business Unit Default** field defaults to **checked**. Do not change this value.
17. In the **Supervisor Information** section, enter or select the **ID** of the individual who will approve expense transactions for the employee. This may or may not be the employee's actual supervisor. The **ID** is used by the workflow process to route transactions for the supervisor level approval.
18. In the **Default ChartField Values** section of the page, enter the standard charge distribution used by the employee. The values entered here will automatically default when an expense transaction is created for that employee in Cardinal. The values can be updated if necessary on the Expense Report or Travel Authorization, but cannot be updated on the Cash Advance.
19. The **Cash Advance Level** field defaults to **Business Unit**. All Business Unit Cash Advance Levels are set up with a maximum allowable limit of \$5,000.00. The other two options are:
  - a. **Specific Amount:** if the employee is eligible for a specific amount either higher or lower than the standard \$5,000, click this indicator and enter the amount.
  - b. **None:** if the employee is **not** eligible for cash advance, click this indicator.
20. Click the **User Defaults** tab.





## Accounts Payable Job Aid

### SW AP316 Creating and Updating an Employee Profile

The **User Defaults** tab displays.

**Default Creation Method**

\*Expense Report

\*Time Report

\*Travel Authorization

**Expense Defaults**

Report Description

Business Purpose

Originating Location

Expense Location

Transportation ID

Per Diem Range

Billing Type

**Payment Type**

Credit Card

Number of Nights

**Accounting Detail Default View**

**Expense Type Defaults** Personalize | Find |  First 1 of 1 Last

Expense Type

\*Expense Type

Payment Type

Billing Type

**Project Defaults for Expenses** Personalize | Find | View All |  First 1 of 1 Last

**Project Defaults for Expenses**

Enabled	PC Business Unit	Project	Description	Activity	Description	Source Type	Category	Sub
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Time Defaults**

Country

State

Locality

Billing Type

Select Project ChartFields Display :

☒ Default : Codes

☐ Descriptions

☐ Codes

**Project Defaults for Time** Personalize | Find | View All |  First 1 of 1 Last

**Project Defaults for Time**

Enabled	PC Business Unit	Project	Description	Activity	Description	Source Type	Category	Sub
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

21. The **User Defaults** tab allows you to specify user default values that reduce data entry for travel authorizations, expense reports, and cash advances. These values can easily be changed on the expense transaction by the proxy during data entry if necessary. Suggested defaults:

a. **Expense Defaults** section:

**SW AP316 Creating and Updating an Employee Profile**

- i. Select **Payment Type CHK** as a user default. This field is required on all Travel Authorization and Expense Report lines and if set as a default, it will auto-populate each line when creating a Travel Authorization or Expense Report for the employee. This does not mean the employee will be reimbursed by check. Employees will be reimbursed via their setup on their Bank Accounts tab.
  - ii. In the **Accounting Detail Default View** field, select **Expanded**.
  - b. Enter Project defaults if an employee requires this information on all expense reports. Click the **Enabled** check box in order for these Project ChartFields to default on the employee Travel Authorizations and Expense Reports.
- 22.** Click the **Save** button at the bottom of the page to save the employee profile. After saving the employee profile, it must be validated before it can be used on an expense transaction. Cardinal verifies that the employee's organizational data is valid and the employee is eligible for expense processing. The validation process runs every hour in batch between 8-5 daily. The **Valid for Expenses** field on the **Organizational Data** tab updates to **Yes** and the **Reason for Status** field updates to **Passed All Validation Edits**.
- 23.** Remember to add at least one proxy for the employee in order to process expense transactions on behalf of that employee. For more detailed information about how to authorize a proxy, see the job aid entitled **AP315 Authorizing a Proxy for an Employee** located on the Cardinal website in **Job Aids** under **Learning**.

### **Employee Working for Multiple Cardinal Agencies**

If the employee is working for more than one state agency, a profile must be created for each agency from which the employee is requesting a reimbursement of expenses:

1. Create an alternative Employee ID number that will be used for your agency.
2. The new ID should be the nine digits from the State Employee Human Resources ID number and 60-69 as the suffix (e.g., 00123456760). This alternative Employee ID number is used for all Expense Transactions created by your agency for this employee.
3. Once you create that alternative Employee ID, enter the employee profile by following the steps in the **Creating a New Employee Profile** section of this job aid.

### **Updating an Employee Profile**

If the Employee Profile already exists, there are various reasons why you may need to update it. Review the Employee Profile Maintenance form and/or discuss with the employee to determine which scenario is applicable:

- Employee works for your agency and requires changes (e.g., moves to another department, requires changes to the default ChartField values, assigned to a new supervisor, etc.).
- Employee moves from one state agency to another state agency.
- Employee leaves your agency and you need to update the status to terminate.

### **Employee Works for Your Agency and Requires a Change**

If an employee works for your agency and requires a change, access the **Employee Profile (Edit)** page using the following path:

**Main Menu > Travel and Expenses > Manage Employee Information > Update Profile**

Favorites ▾ Main Menu ▾ > Travel and Expenses ▾ > Manage Employee Information ▾ > Update Profile

#### Employee Profile (Edit)

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** Add a New Value

▼ Search Criteria

Search by: Employee ID ▾ begins with 00123456700 x

Limit the number of results to (up to 300): 300

**Search** Advanced Search

Find an Existing Value | Add a New Value

1. On the **Find an Existing Value** tab, enter the **Employee ID**.
2. Click the **Search** button.

[Favorites](#) > [Main Menu](#) > [Travel and Expenses](#) > [Manage Employee Information](#) > [Update Profile](#)

[Employee Data](#) | [Organizational Data](#) | [User Defaults](#)

**Bob Beaver**

**Employee Information**

\*Last Name:  x      \*First Name:

Telephone:       Employee Base: ☐ Home ☒ Office

\*Personnel Status:       Payments Sent To: ☒ Home Address ☐ Mailing Address

**Home Address**

Country:   United States

Address 1:

Address 2:

eVA VLIN:

eVA Address ID:

City:

County:       Postal:

State:   Virginia

**Mailing Address**

Country:   United States

Address 1:

Address 2:

eVA VLIN:

eVA Address ID:

City:

County:       Postal:

State:

[Employee Data](#) | [Organizational Data](#) | [User Defaults](#) | [Bank Accounts](#)

3. Access the tab of the page that requires change(s).
4. Update the employee profile information as appropriate.
5. Click the **Save** button. Any changes made to the employee profile are saved.

**Employee Moved from One Cardinal Agency to Another Cardinal Agency**

If an employee has moved to your agency from another Cardinal agency, there are several steps that you will need to complete.

**Example: If an employee is leaving Agency A and moving to Agency B****Agency A must:**

- Change the employee status on the profile to Terminated for your agency.
- If this employee is a Supervisor (approving other employee's expenses at your agency), remove them from the Supervisor role for all impacted employees and update with new Supervisor.
- Delete all proxies for that employee. See the job aid entitled **SW AP315 Authorizing a Proxy for an Employee** for details.

**Agency B must:**

- Create and submit a Help Desk Ticket (see step 1 below for details of how to structure the Help Desk ticket).
- Add a proxy / proxies for the employee. See the job aid entitled **SW AP315 Authorizing a Proxy for an Employee** for details.

**SW AP316 Creating and Updating an Employee Profile**

1. Open a Help Desk ticket indicating “Cardinal Security” in the subject line to request them to make changes on the employee profile. The email address for statewide requests is:  
[vccc@vita.virginia.gov](mailto:vccc@vita.virginia.gov).

This allows you to update the profile with your agency Business Unit, the correct supervisor, and default ChartField information. See below for a sample e-mail:

To: [vccc@vita.virginia.gov](mailto:vccc@vita.virginia.gov)

Subject: Cardinal – Security Employee Profile Change Needed Employee ID: XXXXXXXXXXXX

Please make the below update to the employee profile for XXXXXXXXXXXX. This employee has moved from Cardinal Business Unit XXXXX to YYYYY.

For proper Expense Module processing, the below information must be updated so that agency XXXXX has access to make the remaining updates.

We understand the employee must be Terminated from the original BU, so please let us know if processing time will be longer than normal.

Employee ID: XXXXXXXXXXXX

Name: <Employee full name in Cardinal>

Former Business Unit: XXXXX

New Business Unit: YYYYY

New Department: XXXXX (size depends on the BU)

New Supervisor Employee ID: XXXXXXXXXXXX

New Supervisor Name: <Employee Name in Cardinal>

2. Once a communication is received back from VCCC indicating the changes have been made (Help Desk ticket is closed), navigate to the **Employee Profile (Edit)** page using the following path:

**Main Menu > Travel and Expenses > Manage Employee Information > Update Profile**

Navigation: Favorites ▾ | Main Menu ▾ > Travel and Expenses ▾ > Manage Employee Information ▾ > Update Profile

#### Employee Profile (Edit)

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** | Add a New Value

▼ Search Criteria

Search by: Employee ID ▾ begins with 00123456700 x

Limit the number of results to (up to 300): 300

**Search** | Advanced Search

Find an Existing Value | Add a New Value

3. Click the **Find and Existing Value** tab.
4. Enter the **Employee ID** number.
5. Click the **Search** button.



[Favorites](#) > [Main Menu](#) > [Travel and Expenses](#) > [Manage Employee Information](#) > [Update Profile](#)

[Employee Data](#) | **[Organizational Data](#)** | [User Defaults](#) | [Bank Accounts](#)

### Jane Doe

Expenses Processing Data Find | View All | First | 1 of 1 | Last

Valid for Expenses: No Validate  
 Reason for Status:   
☒ Default Profile  
☐ Ignore Authorized Amounts  
☐ Ignore Group Location Amounts  
 Per Diem Amount Type: Active Amounts

**HR Information**  
 Employee Status: Active  
 Hire Date: 11/28/2016  
 \*GL Unit: 12200 Dept of Planning and Budget  
 \*Department: 11200 Education and Transportation  
 Hours Per Period: ☒ Use Business Unit Default

**Supervisor Information**  
 \*ID: 00446170800  
 Name: CARDINAL, TOM  
 Cardinal, Kelly

**Default ChartField Values** Personalize | Find | First | 1 of 1 | Last

*GL Unit	Fund	Program	Cost Center	Task	FIPS	Asset	Agency Use 1	Agency Use 2	Affiliate	Fund
12200	01000	799001								

**Cash Advance Level**

☒ Business Unit 5,000.00 USD  
☐ Specific Amount  
☐ None

**Expense Role**

"If desired, an expenses role can be associated with this employee. Please note that only one role can be assigned, per employee, no matter how many jobs they hold within the company."

Expense Processing Role:

Save Return to Search Notify Add

- Click the **Organizational Data** tab.
- Verify the information provided in the email was updated correctly (**GL Unit**, **Department**, **Supervisor ID**, and **Name**).
- Update the **Default ChartField Values** with those from your Business Unit.
- Click the **Save** button.

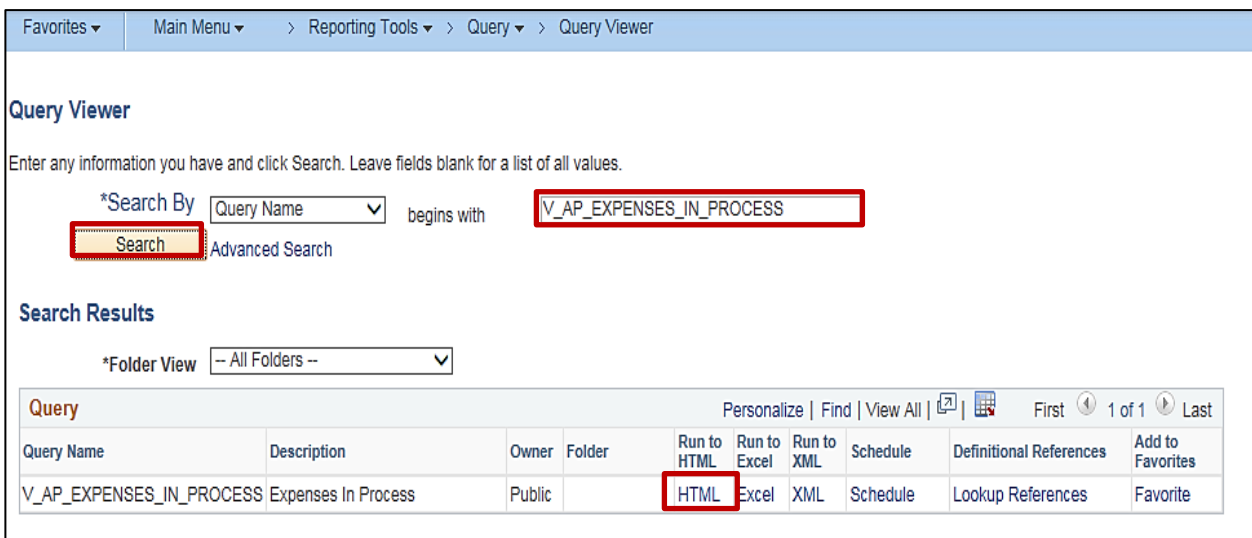
### Changing an Employee Profile Status to Terminated

When an employee no longer works for your agency, the Employee Profile Status needs to be changed to **Terminated**. This should only occur once all Expense transactions have been either paid or deleted and there are no items in the queue for the employee to approve.

#### Verify there are no pending transactions

1. Run the **V\_AP\_EXPENSES\_IN\_PROCESS** query to identify any transactions in progress.
2. Navigate to the **Query Viewer** page using the following path:

**Main Menu > Reporting Tools > Query > Query Viewer**



The screenshot shows the 'Query Viewer' page. At the top, there is a breadcrumb trail: 'Main Menu > Reporting Tools > Query > Query Viewer'. Below this, the 'Query Viewer' section has a search area. It includes a label '\*Search By' followed by a dropdown menu set to 'Query Name'. To the right of the dropdown is the text 'begins with' followed by a text input field containing 'V\_AP\_EXPENSES\_IN\_PROCESS'. Below the search input is a yellow 'Search' button. To the right of the 'Search' button is a link for 'Advanced Search'. Below the search area is the 'Search Results' section. It features a '\*Folder View' dropdown menu set to '-- All Folders --'. Below this is a table with the following structure:

Query									
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
V_AP_EXPENSES_IN_PROCESS	Expenses In Process	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

At the top of the table, there are links for 'Personalize', 'Find', 'View All', and navigation controls for 'First', '1 of 1', and 'Last'. The 'Run to HTML' link in the table row is highlighted with a red box.

3. Enter the Query Name **V\_AP\_EXPENSES\_IN\_PROCESS**.
4. Click the **Search** button.
5. The **Query Name** displays in the **Search Results** section of the page. Click the **HTML** link.



## Accounts Payable Job Aid

### SW AP316 Creating and Updating an Employee Profile

V\_AP\_EXPENSES\_IN\_PROCESS - Expenses In Process

Business Unit (% for all) 15100  
Dept ID (% for all) %

View Results

Download results in : Excel Spreadsheet CSV Text File XML File (5 kb)

View All

	Report Type	Business Unit	Department ID	Current Approver User ID	Approver Type	Report ID	Report Status	Employee ID	Employee Name	Report Description	Total Amt	Amt Due Employee	Budget Status	Accounting Date	Submit Date	Entered By Userid	Out of Policy	Duplicates Exist	Associated Travel Auth ID	Associated Advance ID
1	Advance	15100	95400			0000000872	Staged	0098762016	Ranger, Pete	Class Fee	250.00	250.00		11/17/2016	11/17/2016	FINUSER01				
2	Advance	15100	95400			0000000873	Staged	0098762016	Ranger, Pete	Business Writing Class Fee	250.00	250.00		11/17/2016	11/17/2016	FINUSER01				
3	Advance	15100	95400			0000000874	Staged	0098762016	Ranger, Pete	Registration Fee and Expenses	250.00	250.00		11/29/2016	11/29/2016	FINUSER01				
4	Expense Report	15100	95400	UHK37558	SUPERVISOR	0000106196	Submitted for Approval	0098762016	Ranger, Pete	Business Writing Class	61.53	61.53	N	11/17/2016	11/17/2016	FINUSER01	N	N		
5	Expense Report	15100	95400			0000106195	Staged	0098762016	Ranger, Pete	Quarterly Meeting	105.30	105.30	V	11/30/2016	11/17/2016	FINUSER01	N	N		
6	Expense Report	15100	95400			0000106197	Staged	0098762016	Ranger, Pete	Business Writing Class	311.88	11.88	V	11/30/2016	11/29/2016	FINUSER01	N	N		
7	Travel Authorization	15100	95400	UHK37558	SUPERVISOR	00000005164	Submitted for Approval	0098762016	Ranger, Pete	Quarterly Meeting	137.10	0.00	V	11/17/2016	11/17/2016	FINUSER01	N	N		

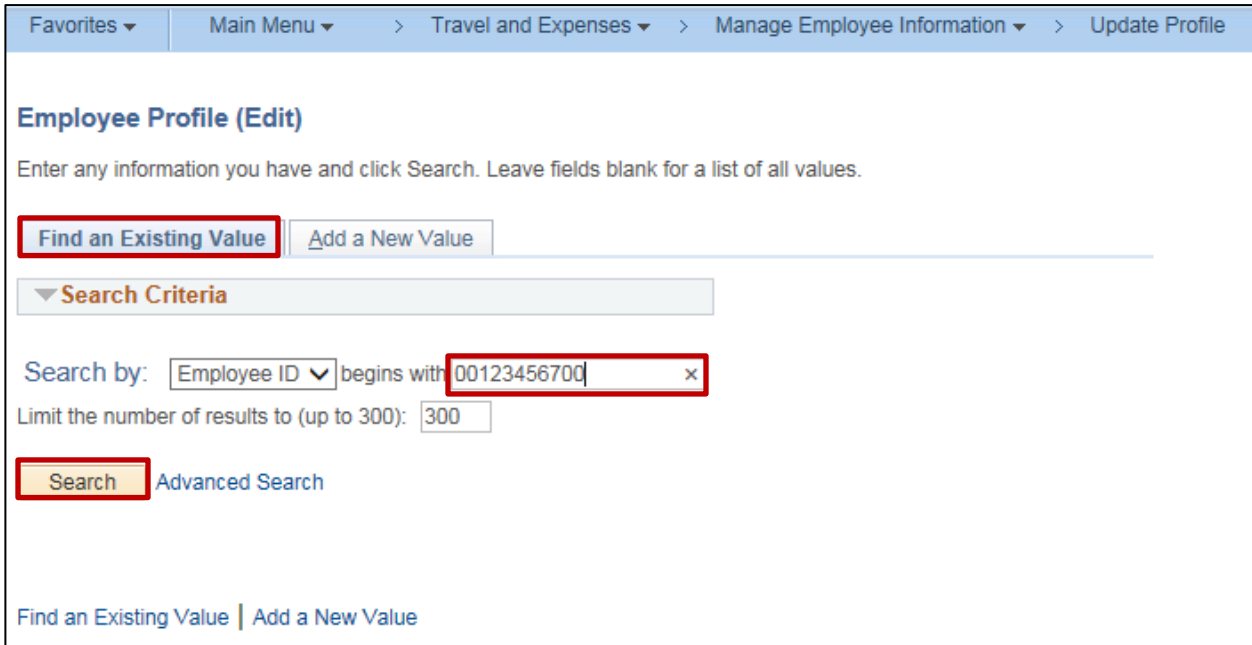
6. Enter your agency **Business Unit** in the **Business Unit** field.
7. Enter the **Department ID** of the employee that needs to be terminated or % to show all departments.
8. Click the **View Results** button to run the query.
9. Review the results to determine if the employee you need to terminate has any transaction in progress. If so, ensure the transaction(s) are approved or deleted prior to terminating the employee in the system.

Once all items are clear and the employee does not display on the list, you can terminate the employee in Cardinal.

#### Terminate the employee in Cardinal

10. Navigate to the **Employee Profile (Edit)** page using the following path:

**Main Menu > Travel and Expenses > Manage Employee Information > Update Profile**



11. On the **Find an Existing Value** tab enter the **Employee ID** of the employee being terminated.
12. Click the **Search** button.

[Favorites](#) > [Main Menu](#) > [Travel and Expenses](#) > [Manage Employee Information](#) > [Update Profile](#)

[Employee Data](#) | [Organizational Data](#) | [User Defaults](#)

**Bob Beaver**

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**Expenses Processing Data** [Find](#) | [View All](#) | First 1 of 1 Last

Valid for Expenses ☐ No [Validate](#)

Reason for Status

☒ Default Profile  
☐ Ignore Authorized Amounts  
☐ Ignore Group Location Amounts  
 Per Diem Amount Type [Active Amounts](#)

**HR Information**

Employee Status Terminated

Hire Date

\*GL Unit  Dept of Planning and Budget

\*Department  Education and Transportation

Hours Per Period ☒ Use Business Unit Default

**Supervisor Information**

\*ID

Name CARDINAL, TOM

**Default ChartField Values** [Personalize](#) | [Find](#) | First 1 of 1 Last

*GL Unit	Fund	Program	Cost Center	Task	FIPS	Asset	Agency Use 1	Agency Use 2	Affiliate	Fund
<input type="text" value="12200"/>	<input type="text" value="01000"/>	<input type="text" value="799001"/>								

**Cash Advance Level**

☒ Business Unit 5,000.00 USD  
☐ Specific Amount  
☐ None

**Expense Role**

"If desired, an expenses role can be associated with this employee. Please note that only one role can be assigned, per employee, no matter how many jobs they hold within the company."

Expense Processing Role

[Save](#) [Return to Search](#) [Notify](#) [Add](#)

13. Verify that you have entered the correct employee.
14. Click the **Organizational Data** tab.
15. Before changing any information, take a before screenshot and save for your agency's records. Screenshots are recommended because there is no effective dating on Employee Profiles. Once a change is made; you are no longer able to view prior information.
16. In the **Employee Status** field, select **Terminated**.
17. Take a screenshot after changing the status for your agency's records.
18. Click the **Save** button. The Employee Record has been updated.